Some Thoughts on the New Email System

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By February 2013, we should be completely moved to a new, State-managed, email system (CES Email). This new email system will require us to manage our email differently than we are used to. The differences include:

- ❖ Retention policies will be enforced for the Inbox, Sent Items and Deleted Items folders. The retention policies are 90 days, 5 days and 5 days respectively.
    - ❖
- ❖ We will no longer be able to archive emails. The AutoArchive settings will be disabled.
    - ❖
- ❖ We will have to manage our email manually.
- 1.
- ❖ We will have a hard limit of 5 GB for all email messages.

First of all, don't panic.

Here is what I am going to do (am doing) . . .

2. I like to archive my messages by year. In the past, I have had one archive file (*.pst file) for each year. To continue this, I plan on creating a high level folder to store my message for each year.
    a. Right click on Mailbox – {your name}, and create a folder.
        3.
4. Under the folder I created in Step 1, I plan to create a series of folders and sub-folders for my message.
    a. Right click on folder you created in step 1, and create as many sub-folders as you need.
        5.
6. On a regular basis, move messages from your Inbox into one of the folders you created in Step 2.

7. Move message from your Sent Items into one of the folders you created in Step 2. If you did not create a repository for your sent items in Step 2, I would urge you to consider it if you use the Sent Items folder. Your use might be searches of what you have sent to people, re-sending messages, or verification that you really did send a message. If you decide you need this, you will have to move

your Sent Items at least once every five calendar days. If you take long vacations or the Wednesday before Thanksgiving off, you will have to be extra diligent about moving these items.

8.
   a. For bonus points, you can set up a rule in Outlook to automatically copy every sent message to the new folder. Then you won't have to worry about the retention policy for the Sent Items.
9.
10. Each year, repeat these steps.

The new CES system will allocate you 5 GB of space for all your email. This amount of space would last me about two and half years before I could no longer accept any more messages. At that point, I would have to delete some messages before I could receive any new message in my Inbox. Your mileage may vary, but I think it is safe to say that you have at least a year before you have to do any serious management of email messages (and you probably have longer unless you get more emails than Kamyar).

So, what are your options for managing those email messages? If you are retiring in the next year or two, don't worry about it.   If not, then you should figure out what you are going to do with your messages.

The most direct strategy is to use PDF files or the Windows file system to store your email messages. Each of these has advantages and disadvantages, which I try to summarize in the following table.

Choice	Advantages	Disadvantages
PDF File	You can create as many PDF files as you want.	The more files you have, the greater time it will take you to manage them.
	You can archive an entire folder to a PDF file.	If the PDF file becomes corrupted, you can lose all messages in the file.
	Within the PDF, you can sort by To, Subject and Date.	
	You can add messages to files.	You can search an individual file using the PDF search features. You cannot search multiple PDF
	You can open attachments in their native format.	files unless you do it one at a time.

Choice	Advantages	Disadvantages
Windows File System	You can create as many folders as you want. Saves individual messages as an individual file. If one message gets corrputed, then you don't lose everything. Can still open attachments in their native format.	The more folders you have, the greater time it will take you to manage them. You will not be able to search the contents of each file, only the file attributes (title, date, size and type). You cannot search by the dates the you sent/received the email messages or the recipient.

A disadvantage of both messages is the difficulty in searching through multiple files. This defeats the purpose of saving all of the messages in the first place. But, you know that you have the messages if you ever need them.

Of the two options above, I believe PDF is the best option. I can search messages by the date I sent them which is important to me. I can also archive an entire email folder and all of its subfolders. As such, I plan to create a PDF archive of my top level folders.

As you get more and more messages, you will have to spend more and more time managing all the files and folders. I do not relish this though.

A second strategy is to use fewer attachments with your emails. This will require you to save the file somewhere the email recipients can get to it, paste a link to the file in the email, and send the message without the attachment. If you don't attach files, then you can extend the time it will take to fill up the 5 GB of space by a lot. Instead of two years, the allocated space may last more than five years.

This strategy works for emails that are sent to people in the Department. We can all get to the file servers in the Department. It does not work for messages going to people outside the Department, or when other people send you email messages with attachments.

One alternative to saving files on a file servers is to save files on LifeRay and (soon) SharePoint sites. LifeRay sites are accessible by anyone, and can be configured so that people outside can download and save files. I have not played with SharePoint

much, but I assume it operates in a similar manner to LifeRay. Sure, you have to set up and manage a LifeRay site or two. That is not too difficult to learn how to do. The harder part is getting people to change.

Another alternative in this vein is to use the Department's Dropbox. The Department is rolling out its own version of Dropbox sometime this year. I have not had a lot of time to play with it, but it is a place you can share files with people outside of the Department. The one disadvantage seems to be that you cannot drag and drop files.

A third strategy is to delete those email messages you do not really need. You know what I am talking about, messages like DWR AquaNet News announcements and declining to go to lunch. You do not need to save every email mesasge. If you think about it, you might even be able to delete an email thread, keeping only the last email that contains the entire thread. Doing this is fine in theory, but I think I am going to have a hard time implementing it.

A variant of this strategy is to put certain folders inside your Inbox. If you receive email messages from lists (like DWR News) you can store them in a subfolder of the Inbox. These sorts of messages are good to get, but they get stale. If you create a subfolder in the Inbox, then these messages will be managed by the CES retention policy.

All of these strategies will require you to manage your email differently than you did last year. It will be different. The intent is to make the change as painless as possible.

If you can extend the useful life of your CES email space allocation, you probably will not have to do much file management at all. It is rare for me to search messages much older than a few years. Yes, there are cases when you have to have the information from long ago. In those cases, use PDF or the Windows file system to save your messages.

My birthday wish this year was to have CES allocate more space to us over time. Hey, it could happen!

If you are like me, you would like something to help you create a folder structure. I have created a few tools to help at:

https://h2odata.water.ca.gov/web/guest/library/-/document_library/view/4524927

(This is a LifeRay site that you can access. You will not need to log in to download a file.)

There are two tools:
a. A workbook that will copy an Outlook folder structure from one Outlook folder to another.
b. A workbook that will coopy an Outlook file structure to the Windows file system.

For each tool, there is a version for Outlook 2007 and Outlook 2010. Most of you will use the Outlook 2007 versions.

You will have to enable macros for Excel to run the tools.